

WASHINGTON  
**H I G H E R**  
**EDUCATION**  
COORDINATING BOARD

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2003 – 2004

**GEAR UP Scholarship  
Administrator's Manual**

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## GEAR UP Overview

GEAR UP or “Gaining Early Awareness and Readiness for Undergraduate Programs” aims to give students the message that with early planning and hard work, they can go to college. GEAR UP is helping thousands of disadvantaged middle and high school students think about, prepare for, and succeed in college.

Washington State GEAR UP is a partnership of the Office of the Governor, the Higher Education Coordinating Board, and the University of Washington. It is funded by a five-year, \$15.5 million, grant from the U.S. Department of Education. Funding is expected to last through June 2004.

Washington State GEAR UP provides tutoring, mentoring, career and college information, and community service opportunities for 1,200 at-risk students in grades 7-12 every year. As a part of these efforts, we also provide scholarships to students who successfully participate in the direct services component of the grant, the Scholars Project.

## The Scholars Project

Scholars Project participants are typically the first in their families to think about or pursue higher education. All come from low-income communities with high numbers of at-risk youth.

The Scholars Project currently serves students in Aberdeen, Elma, Hoquiam, Inchelium, Quincy, Seattle, Spokane, Tacoma, Taholah, Wapato, White Swan, and Yakima.

## Contact Information

Questions and concerns about GEAR UP

Scholarships should be directed to:

**Susan St. George**  
Program Manager  
917 Lakeridge Way  
PO Box 43430  
Olympia, WA 98504-3430  
Phone: (360) 753-7834  
Email: [susans@hecb.wa.gov](mailto:susans@hecb.wa.gov)

**Lynette Berry**  
Program Coordinator  
917 Lakeridge Way  
PO Box 43430  
Olympia, WA 98504-3430  
Phone: (360) 753-7837  
Email: [lynettab@hecb.wa.gov](mailto:lynettab@hecb.wa.gov)

In 1999, GEAR UP replaced the federal grant program known as NEISP. Students who have successfully participated in either program are now eligible for what we call the GEAR UP scholarship. For awarding purposes, NEISP and GEAR UP are one and the same.

NOTE: Beginning with the 2001-02 year, students may receive both the GEAR UP scholarship and the State Need Grant (SNG). The GEAR UP scholarship is separate from the regular SNG award, funds are held in a separate account, and GEAR UP awards do not impact SNG or TRIO allocations. You can find references to these program changes in the 2001-02 SNG Program Manual on pp. II-7 and II-8.

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**Eligibility Requirements**

To be eligible for a GEAR UP scholarship, students must:

1. Successfully participate in NEISP or Washington GEAR UP for one year or more;
2. Earn one or more years of scholarship;
3. Graduate from high school or earn a General Education Development (GED) certificate and complete the requirements for college admission;
4. Enroll at least half-time;
5. Enroll at an eligible institution;
6. Not be in an unsatisfactory progress-denied condition;
7. Complete and return a Free Application for Federal Student Aid to the federal processor; and
8. Send a completed Graduate Data Form, with attachments, to the GEAR UP office in Olympia.

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**List of Eligible Students**

You can get a list of currently eligible students from the Higher Education Coordinating Board's password-protected financial aid Web site, located at: <https://fortress.wa.gov/hecb/secure/login.asp>. We will update this list at least monthly.

If you do not see a student's name on the list, it may mean the student has not yet submitted a Graduate Data Form, transcript, or high school diploma to GEAR UP staff in Olympia. Please contact Susan St. George at (360) 753-7834 or [susans@hecb.wa.gov](mailto:susans@hecb.wa.gov) with any questions or concerns about student eligibility.

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**Maximum Years of Eligibility**

Students may receive up to four years of scholarship (12 quarters or eight semesters).

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### Scholarship Expiration

Students must begin using their awards by the fall term, within two years of high school graduation. Scholarships expire seven years after high school graduation.

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### Monitoring Eligibility

Institutions are responsible for monitoring and responding to changes in student eligibility that affect the GEAR UP Scholarship Award. Additional information on monitoring can be found on page 7.

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### Academic Progress Requirement

To remain eligible for the GEAR UP scholarship, a student must meet his/her institution's academic progress policy on financial aid awards.

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### Need vs. Cost of Attendance

By federal regulation, the GEAR UP Scholarship may exceed a student's financial need, but may not, in combination with other aid, exceed the student's total cost of attendance.

The Financial Aid Administrator (FAA) may, using professional discretion, allow the scholarship to replace a portion of the student's Expected Family Contribution (EFC). FAA's may decide to reduce the student's EFC, based on a change in financial circumstances.

For students who demonstrate no financial need, the scholarship should be awarded in a manner similar to other merit-based aid programs, but prorated for less than full-time enrollment.

### Packaging the scholarship

We ask that you observe the following priorities. If adjustments are necessary, the scholarship should replace, in the following order:

- remaining unmet need
- loans
- work obligations
- remaining financial aid awards, except Pell

Please characterize this award in any communications with students, including award letters, as the “GEAR UP Scholarship.” Recipients contributed hundreds of hours to community service and college preparation activities to earn this award.

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### TRIO

The GEAR UP scholarship is separate from enhanced SNG awards for TRIO participants.

Once a student receives the GEAR UP Scholarship award, the institution must monitor for continued eligibility. Students must continue to meet all eligibility requirements as outlined on page 4.

### **Revised Eligibility**

In general, it is a good idea to re-evaluate the student's eligibility for the GEAR UP Scholarship whenever a recalculation is required for federal student aid programs.

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### **Satisfactory Academic Progress (SAP)**

As outlined in the eligibility guidelines, students cannot receive the GEAR UP scholarship when they are denied federal or state aid for SAP reasons. At the end of each term, the institution must examine each scholarship recipient's progress and determine whether the student is making satisfactory progress toward his/her program requirements.

Unlike State Need Grant, GEAR UP does not define satisfactory progress. Instead, the academic progress policy of the institution determines the SAP status of each student.

**Eligible Institutions**

Students who are eligible for a GEAR UP Scholarship may use their scholarship awards at any of the following institutions:

**Four-Year Public Colleges and Universities**

Central Washington Univ.  
Eastern Washington Univ.  
The Evergreen State College  
Portland State Univ. (OR)  
University of Washington  
Washington State University  
Western Washington Univ.

**Two-Year Public Colleges and Universities**

Bellevue CC  
Big Bend CC  
Cascadia CC  
Centralia College  
Clark College  
Columbia Basin College  
Edmonds CC  
Everett CC  
Grays Harbor College  
Green River CC  
Highline CC  
Lower Columbia College  
North Seattle CC  
Northwest Indian College  
Olympic College  
Peninsula College  
Pierce College  
Seattle Central CC  
Shoreline CC  
Skagit Valley College  
South Puget Sound CC  
South Seattle CC  
Spokane CC  
Spokane Falls CC  
Tacoma CC  
Walla Walla CC  
Wenatchee Valley College  
Whatcom CC  
Yakima Valley College

**Two-Year Public Technical Colleges**

Bates Technical College  
Bellingham Technical College  
Clover Park Technical College  
Lake Washington Tech. College  
Renton Technical College  
Seattle Vocational Institute

**Four-Year Private Colleges and Universities**

Antioch University  
Bastyr University  
Chapman University  
City University  
Cornish Institute  
Gonzaga University  
Henry Cogswell College  
Heritage College  
Lesley College  
North Idaho College (Idaho)  
Northwest College, Kirkland  
NW College of Art, Poughkeepsie  
Pacific Lutheran University  
University of Phoenix  
Saint Martin's College  
Seattle Pacific University  
Seattle University  
University of Puget Sound  
Vincennes University  
Walla Walla College  
Whitman College  
Whitworth College

**Private Technical Colleges**

Apollo College  
Art Institute of Seattle  
Ashmead College (Seattle Massage)  
Bellevue Beauty School  
Brenneke School of Massage  
Bryman College  
Business Computer Training Institute  
Clare's Beauty College  
Court Reporting Institute  
Crown College  
DeVry Institute of Technology  
Divers Institute of Technology  
Eton Technical Institute  
Everett Beauty Academy  
Gene Juarez Academy  
Glen Dow Academy  
Holy Family Radiology  
Interface Computer School  
International Air Academy  
ITT Tech. Institute, Seattle  
ITT Tech. Institute, Spokane  
Mt. Vernon Beauty School  
Northwest Aviation College  
Perry Technical Institute  
Phagans Beauty Schools NW  
Pima Medical Institute  
Western Business College



Upon notification and verification of student eligibility for the GEAR UP Scholarship, the institution should request payment of the student's GEAR UP Scholarship award. This section outlines scholarship payment request procedures.

### Disbursement Procedures

The institution may disburse funds by providing the student with a direct payment or by crediting the student's account. Public institutions are expected to be consistent with institutional policy on the awarding of federal financial aid.

A student must be afforded the opportunity of cashing the GEAR UP Scholarship warrant at his/her own bank or financial institution. A school may not withhold or delay the disbursement of GEAR UP Scholarship funds due to the student owing any debt to the institution.

Disbursements may be made only after the school confirms enrollment. Checks must be consistent with enrollment status at the time of the disbursement.

A student whose off-campus program precludes his/her return to the institution for disbursement may assign Power of Attorney to a responsible person to receive GEAR UP Scholarship payments on his/her behalf. A copy of the Power of Attorney must be kept in the student's file.

Warrants must be disbursed to the student or returned to the Board within 30 days of receipt by the institutions.

### Payment Request Procedure

Institutions must request payment of the GEAR UP Scholarship using the Warrant Request Form (see Section 5: Forms). The FAA should list the names of students who are eligible, including recipients who may have transferred into the institution. The FAA must sign and date the first page of the form and keep a copy for institutional records.

Warrant Request forms should be completed carefully; they will be processed exactly as received. Incomplete or illegible lists may be returned for correction.

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**Responsibility for Warrants**

The institution is responsible for GEAR UP Scholarship checks in its custody, including those that are lost, stolen destroyed, or disbursed to ineligible students.

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**Retroactive Payments**

Retroactive payments may be made to an eligible student as long as the payments are made for the same fiscal year from which funds are drawn. The value of the retroactive payment for a previous term should be based on the student's rate of satisfactorily completed credits at the end of that term. Students need not be enrolled at the time of the retroactive payment.

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**Reconciliation of Records**

Following each term, the Board will send the FAA a cumulative summary of GEAR UP Scholarship disbursements. If the report does not accurately reflect institutional records, the FAA should advise the Board accordingly.

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**Award amount/Payment Schedule**

The amount of the GEAR UP scholarship award for 2003-04 is \$4,050 for full-time enrollment; it should be prorated for half- or three-quarter-time enrollment. The student must be enrolled at least half-time to receive the award. The GEAR UP Scholarship is payable in three equal quarterly installments or two equal semester installments.

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**Transfer Students**

It is the student's responsibility to notify the institution he/she is transferring to and transferring from of scholarship eligibility and intent to transfer.

Students who transfer to or from an institution should contact the GEAR UP office at (360) 753-7800 or [gearup@hecb.wa.gov](mailto:gearup@hecb.wa.gov) to reconfirm eligibility and, if necessary, arrange for the transfer of their scholarship funds. Students must also provide GEAR UP with updated Graduate Data sheets.

Students must inform GEAR UP of any changes in enrollment status or institution.

The following forms and instructions assist FAA's and students to properly request and process GEAR UP Scholarships.

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**Graduate Data Sheet**

Students must complete the Graduate Data Sheet and send it to the GEAR UP office in Olympia. Students must include official final high school transcripts and copies of their high school diplomas as attachments. A copy of the Graduate Data Sheet is included at the end of this section.

Students who transfer to or from an institution should contact Lynette Berry, GEAR UP Program Coordinator at (360) 753-7837 or [lynetteb@hecb.wa.gov](mailto:lynetteb@hecb.wa.gov) to reconfirm eligibility and, if necessary, arrange for the transfer of their scholarship funds. Students must also provide GEAR UP with updated Graduate Data sheets.

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**Warrant Request Form**

The Warrant Request form is the instrument that must be used to request payment of the GEAR UP Scholarship. A copy of the form is included at the end of this section.

The FAA should list the names of students who are eligible, including recipients who may have transferred into the institution. The FAA must sign and date the first page of the form and keep a copy for institutional records.

Warrant Request forms should be completed carefully; they will be processed exactly as received. Incomplete or illegible lists may be returned for correction. See the following page for additional instructions on completing the Warrant Request form.

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**Affidavit of Lost or Destroyed Warrant**

Private institutions do not receive payment of GEAR UP Scholarship funds electronically and may use this form to certify the loss or destruction of a Board warrant. This form must be signed and notarized before being returned to the GEAR UP office in Olympia.

**Required Information**

The following information must be provided to order warrants:

**Social Security Number (SSN)** – These are used to generate payments and monitor the number of terms a student has received the scholarship award. All nine digits must appear on the Warrant Request form.

**Student Name** – Names should not be abbreviated. Nicknames should NOT be used. Middle initial should be provided if available. If the student has no middle initial, please leave that space blank.

**Amount to be Paid** – The warrant should be requested in whole dollars only.

**Term Payment** – One of the following term payment codes should be used:

- 2 = Fall Term
- 3 = Winter Quarter
- 4 = Spring Term

**Is this a revised payment?** Write “Yes” or leave this blank. See definitions for more information on whether to indicate this is a revised payment.

**Is this a Supplemental Award?** Write “Yes” or leave this blank. See definitions for more information on whether to indicate this is a supplemental award.

**Status** – Status refers to the student’s expected enrollment status at the time of disbursement. One of the following codes should be used:

- 1 = Full-time student
- 2 = Half-time student
- 3 = Three-quarter time student

**Certification and Signature** – The FAA must sign the certification statement on the Warrant Request form. If multiple pages are submitted at one time, only one certification is necessary.



Washington State  
Gaining Early Awareness and Readiness for  
Undergraduate Programs

## Graduate Data Sheet

Dear GEAR UP Graduate:

In order for you to receive your GEAR UP Scholarship, you must provide the following information:

- ▶ A completed GEAR UP Graduate Data Sheet
- ▶ A photocopy of your diploma or GED
- ▶ A copy of your final transcript

Mail these three documents to: GEAR UP  
Higher Education Coordinating Board  
PO Box 43430  
Olympia, Washington 98504-3430

Your Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Email Address: \_\_\_\_\_

Your Current Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone Number: (\_\_\_\_\_) \_\_\_\_\_

Date you graduated from high school (month/year): \_\_\_\_\_ / \_\_\_\_\_

Name of postsecondary institution (college, university, vocational college, etc.) you plan to attend:  
\_\_\_\_\_

Date you plan to start attending school (month/year): \_\_\_\_\_ / \_\_\_\_\_

Your planned major (or field of study): \_\_\_\_\_

Have you applied for admission to this institution: ☐ Yes ☐ No

Have you completed a Free Application for Federal Student Aid (FAFSA): ☐ Yes ☐ No

*So that we will be able to reach you even if your address changes, please provide us with the name, address, and telephone number of a parent, adult relative, or other adult whom you do not live with, but who would always know where to find you.*

Adult Relative/Friend's Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone Number: (\_\_\_\_\_) \_\_\_\_\_

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

**PAYMENT REQUEST FORM  
GEAR UP SCHOLARSHIP PROGRAM  
FY 2002-2003**

**Name of Institution:** \_\_\_\_\_ **Institution Code:** \_\_\_\_\_ **Page :** \_\_\_\_\_ **of** \_\_\_\_\_

**PLEASE TYPE OR PRINT LEGIBLY!**

| Social Security Number | Student's Last Name | Student's First Name | Student's Middle Initial | Amount to be paid this term? | Term<br>Fall = 2<br>Winter = 3<br>Spring = 4 | Revised payment?<br>(Yes or Blank) | Supplemental payment?<br>(Yes or Blank) | Enrollment<br>Full Time = 1<br>Part Time = 2<br>¾ Time = 3 |
|------------------------|---------------------|----------------------|--------------------------|------------------------------|--|------------------------------------|---|--|
| 1. _____               | _____               | _____                | _____                    | \$ _____                     | _____  | _____                              | _____                                   | _____  |
| 2. _____               | _____               | _____                | _____                    | \$ _____                     | _____  | _____                              | _____                                   | _____  |
| 3. _____               | _____               | _____                | _____                    | \$ _____                     | _____  | _____                              | _____                                   | _____  |
| 4. _____               | _____               | _____                | _____                    | \$ _____                     | _____  | _____                              | _____                                   | _____  |
| 5. _____               | _____               | _____                | _____                    | \$ _____                     | _____  | _____                              | _____                                   | _____  |
| 6. _____               | _____               | _____                | _____                    | \$ _____                     | _____  | _____                              | _____                                   | _____  |
| 7. _____               | _____               | _____                | _____                    | \$ _____                     | _____  | _____                              | _____                                   | _____  |
| 8. _____               | _____               | _____                | _____                    | \$ _____                     | _____  | _____                              | _____                                   | _____  |
| 9. _____               | _____               | _____                | _____                    | \$ _____                     | _____  | _____                              | _____                                   | _____  |
| 10. _____              | _____               | _____                | _____                    | \$ _____                     | _____  | _____                              | _____                                   | _____  |

Total Number of Payments: \_\_\_\_\_

Total Amount Requested: \$ \_\_\_\_\_

**THE STATE OF WASHINGTON'S GEAR UP SCHOLARSHIP ELIGIBILITY AND CERTIFICATION STATEMENT**

I hereby certify that the students listed above are:

- A. Matched and verified as eligible against the list of eligible students provided by the Higher Education Coordinating Board,
- B. Enrolled at this institution at least half time, and

I further certify that the above statement is a true and accurate report of the status of the GEAR UP Scholarship recipients for the term indicated above.

\_\_\_\_\_  
Financial Aid Administrator or Business Officer Signature

\_\_\_\_\_  
Financial Aid Administrator or Business Officer Name (Print)

\_\_\_\_\_  
Date

**Mail requests to:**  
GEAR UP Program  
Higher Education Coordinating Board  
PO Box 43430  
Olympia, WA 98504-3430  
Tel: (360) 753-7837  
Fax: (360) 753-7807  
Email: lynetteb@hecb.wa.gov

**HECB USE ONLY**

Initials \_\_\_\_\_ # of Payments \_\_\_\_\_ Request Total \$ \_\_\_\_\_



## AFFIDAVIT OF LOST OR DESTROYED WARRANT

STATE OF WASHINGTON

COUNTY OF

FUND

WARRANT NO.

I, \_\_\_\_\_ having been duly sworn, depose and say that I am the proper owner, payee, or legal representative of such owner or payee of the State of Washington's Warrant No. \_\_\_\_\_, dated \_\_\_\_\_, in the amount of \_\_\_\_\_ dollars and that said warrant has been lost, destroyed, or not delivered to me, and to the best of my knowledge has not been paid.

(Signature)

**Witnesses if signed by “X”:**

(Name)

(Name)

(Address)

(Address)

Subscribed to and sworn before me this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_

Notary Public in and for the State of  
Washington, residing at \_\_\_\_\_

| WARRANT CANCELLATION AUTHORIZATION |            |          |     |      |                 |  |
|------------------------------------|------------|----------|-----|------|-----------------|--|
| AGENCY/SUB                         | ISSUE DATE | BIENNIUM |     |      | WARRANT NUMBER  |  |
|                                    |            |          |     |      |                 |  |
|                                    | NAME       |          |     |      | REGISTER NUMBER |  |
|                                    |            |          |     |      |                 |  |
| ADDRESS                            | CITY       | STATE    | ZIP | FUND | AMOUNT          |  |
|                                    |            |          |     |      |                 |  |
|                                    |            |          |     |      |                 |  |
|                                    |            |          |     |      |                 |  |
|                                    |            |          |     |      |                 |  |
|                                    |            |          |     |      |                 |  |
|                                    |            |          |     |      |                 |  |
|                                    |            |          |     |      |                 |  |
|                                    |            |          |     |      |                 |  |
|                                    |            |          |     |      |                 |  |

### What is a GEAR UP Scholarship?

A GEAR UP Scholarship is a type of financial aid to help you pay for college. You do not have to repay it. You can use it to help pay for tuition, books, and other college expenses.

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### How do students earn a year of scholarship?

To earn one year of GEAR UP Scholarship, students must:

- Participate successfully in the GEAR UP Scholars Program for one or more years.
- Have a parent/sponsor participate successfully for one or more years.
- Graduate from high school and complete the requirements for admission to college.
- Attend an eligible college or university in Washington State.
- Be enrolled at least half time in college.
- Students must begin using their awards by the fall term, within two years of high school graduation.

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### How much can students earn?

Students can earn one year of scholarship for each year they participate, up to four years total. GEAR UP and the Washington Higher Education Coordinating Board decide the amount of the scholarship award each year. The amount may be different each year, but for the 2003–2004 school year, the maximum scholarship award is \$4,050. The Higher Education Coordinating Board keeps track of student hours and the amount of scholarship funds they earn.

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**How do students get their GEAR UP Scholarship?**

When the student graduates from high school, he/she receives a graduate packet with an official scholarship award letter and a Graduate Data Form. Students must fill out the Graduate Data Form and send it with a photocopy of the high school diploma and final official high school transcript to the GEAR UP office in Olympia. Students are also asked to complete and return the Free Application for Federal Student Aid (FAFSA) and give a copy of their award letter to their college's financial aid office. GEAR UP scholarships cannot be used to pursue a degree in theology.

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**What do students need to do to keep getting the GEAR UP Scholarship?**

Students must stay in good academic standing and attend college at least half time. If the student changes his/her address or college, the GEAR UP Program should be notified.

If students meet these requirements, the GEAR UP Scholarship is guaranteed. If the student is enrolled less than full time, the award will be reduced.

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**Whom should students and FAA's call if they have more questions?**

For more information, call Lynette Berry at (360) 753-7837 or e-mail [lynetteb@hecb.wa.gov](mailto:lynetteb@hecb.wa.gov).

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**Eligible Course of Study**

Students may not pursue a theological course of study and receive the GEAR UP Scholarship. Any other course of study is permissible.

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**Revised Payment**

A revised payment or request is one that replaces an earlier warrant drawn for the same term because the student failed to pick it up, or there was a reduction in the student's enrollment status resulting in a reduced scholarship award. For private institutions, the original warrant must be returned to the board for cancellation before a new warrant may be issued.

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**Satisfactory Academic Progress**

Satisfactory Academic progress will be as defined by the institution. See Monitoring Continued Eligibility section for more information.

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**Supplemental Award**

Supplemental awards are additional payment requests processed for the same student for the same term. If it is a payment request in addition to one already received by the Board for that term, the Supplemental Code on the Warrant Request form should be marked "Yes."  
Retroactive payments are not supplemental awards.